

Welcome to CalJOBS Training! In this training, we will learn more about the Case Management features available in CalJOBS.

Objectives

- Enter credential attainment
- Distinguish Closure, Exit and Outcome
- Complete Closure Form
- Enter Follow-Up Activities and Follow-Up Forms
- Review System Alerts and Case Management Groups

In this training, we will:

- Enter credential attainment
- Distinguish Closure, Exit, and Outcome
- Complete Closure form
- Enter Follow-Up Activities and Follow-Up Forms
- Review System Alerts and Case Management Groups

Assisting an Individual

Menu

Home My Dashboard Sign Out Services for Individuals Services for Employers

Quick Search

Enter Search...

My Staff Workspace

My Staff Dashboard

My Staff Resources

My Staff Account

Directory of Services

Services for Workforce Staff

Manage Individuals

Manage Employers

Manage Resumes

Manage Job Orders

CalJOBS

Welcome to My Staff Workspace Rianna Rose.
This page allows you to customize the content you are interested in. Click on a work item, or select another function from the menu on the left hand side.

My Staff Dashboard My Staff Resources My Staff Account Directory of Services

Saved Lists

Individuals Assisted: Joplin, Janis (PEARL2017), LaTroll, Poppy (PINKFLOWER), Wayne, Bruce (BRUCE_WAYNE89), Richmond, Lyndsey (RICHMOND116)

Employers Assisted: Santa Clara County (SANTACLA), CalSTRS (C8032926), CALIFORNIA (SU1)

Create an Individual

One Case Note to Multiple Individuals

Assist an Individual

Create Date

ts available

My Calendar

January 2017

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

0 New Appointments

31 Upcoming Events

Enter the Appointment Center

After logging into the system, the first page you will see is **My Staff Dashboard**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the fly-out menu, as shown in the lower circle.

Or, if you have previously assisted individuals, you can choose from the recently assisted list of individuals in the **Saved Lists** widget, shown in the top circle.

Assisting an Individual

[General | Office]

Quick Assist

You have saved Individual item(s) in [My Search Lists](#).

Here are the 5 most recent individuals you assisted:

- Joplin, Janus (PEARL2017) Assist
- LaTrell, Poppy (PINKFLOWER)
- Wayne, Bruce (BRUCE, WAYNE89)
- Richmond, Lindsey (RICHMONDL16)

General Criteria

Individual Username:

Individual User ID:

StateID Number:

First Name:

Last Name:

SSN (last 4 digits):

SSN (full number): Example: 999999999

State Source ID:

State Activity ID:

Date of Birth: (mm/dd/yyyy)

Quick Search

wayne, bruce

WAYNE, BRUCE

Username: BRUCE, WAYNE89
User ID: 30052496
SSN: ***-**-9666
State ID: 1001008370
Location: HERCULES CA 94547

WAYNE, BRUCE

Username: BWAYNEK300
User ID: 30577740
SSN: ***-**-4300
State ID: 1001474296
Location: DUBLIN CA 94568


There are different search options including Quick Assist and General Criteria. Also, there is a Quick Search at the top right corner of every page.

It is recommended to search by full name and the last 4 digits of the individual's Social Security Number. This will help eliminate the likelihood of opening the wrong person's profile.

Selecting an Individual

Results View: [Summary](#) | [Detailed](#)

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	RTW	Last Exited	Created	Action	Select
BRUCE WAYNE89	Bruce	Wayne	9666		1001008370	02/09/2015	N		02/09/2015	Summary Tab Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>
 BWAYNE6300	Bruce	Wayne	6300		1001474286	04/27/2016	N		02/02/2016	Summary Tab Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>

[Save New List](#)
[Update Existing List](#)

2 Records found

Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the “[Programs Tab](#)” link in the far right Action column.

Verifying Right to Work Documents

Right to Work Verification

Documentation to Right to Work must be provided to assist this individual. Please complete the following information.

Individual: Tracy Tone

Current Citizenship:

USCIS (Alien Registration) Number:

USCIS (Alien Registration) Expiration Date: [Today](#)

[Save](#) [Cancel](#) [Remind me later](#)

Next, you may see a **Right to Work Verification** screen. Staff can enter the information, or bypass by selecting the [Remind me later](#) link at the bottom of the page.

Programs Tab

Case Summary

Programs

Plan

Assessments

Show Summary Tabs

Bridges, Brody

Filter Applications:

All

Filter Activities:

☒ Open

☒ Closed

☒ Voided

Filter Programs

Title I - Workforce Development

Title I - Workforce Development

Apps: 1

Create Title I - Workforce Development (WIOA) Application

WIOA #15696306 - Complete

LWA:	99 - WIOA Statewide Grant Contractor	Application Date:	02/07/2017
Onestop:	2198 - HOMEBOY INDUSTRIES	Participation Date:	N/A
Open/Total Activities:	0 / 0	Closure Date:	N/A
		Exit Date:	N/A

After the Right to Work verification reminder, the Programs tab will appear. You may click anywhere in the light gray box (outlined in pink) to expand the rest of the Title I program application sections.

Credential Attainment in CalJOBS

Creating a Credential

Case Summary Programs Plan Assessments

Show Summary Tabs Bridges, Brody

Filter Applications: All

Filter Activities: ☒ Open ☒ Closed ☒ Voided

Filter Programs: Title I - Workforce Development

Title I - Workforce Development	Apps: 1
---------------------------------	---------

Credentials

[Create Credential](#)

You will enter credential attainment information in the **Credentials** ribbon. To create a credential, expand the gray ribbon called **Credentials**.

Click the "[Create Credentials](#)" link.

General Information

Program: WIOA
 Application Number: 2238442
 Name: Wayne, Bruce
 Application Date: 12/12/2016
 Program Participation Date: 12/12/2016
 Exit Date: Not Applicable
 Maximum date to record after exit: Not Applicable

• LWIA/Region:
 • Office Location:

Credential Information

• Credential Received:
 Other Credential:
 Credential Verification: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)
 • Date Credential Received:
 Associated to Activity: [Search Activities](#)

Credential Received Options:
 None Selected
 High School Diploma
 Secondary / High School Equivalency
 AA/AS Degree
 BA/BS Degree
 Occupational Skills License
 Occupational Skills Certificate or Credential
 Other Recognized Diploma, Degree, or Certificate (specify)
 Graduate/Post Graduate Degree
 Occupational Certification

Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action
300 - Occupational Skills Training (Approved ETPL Provider)	State Center Community College District	Welding - Metal Fabrication (FCC)	10/09/2017	06/15/2018			Select

[Save](#)

Under the **General Information** section, choose your LWIA/Region, then choose your organization from the **Office Location** drop down menu.

In the **Credential Information** section, select the appropriate credential attainment option from the **Credential Received** drop-down menu. The **Credential Verification** field is available for use if you would like verify the credential and upload documentation in CalJOBS. If the Verify link is not utilized, the statement “Copy containing in Case File” will result.


Next, complete the **Date Credential Received** field. Finally, although not marked with a red asterisk, it is required that you select the Search Activities link from the **Associated to Activity** field to associate an activity to this credential attainment. Click the Select link from the “Action” column for the appropriate activity code, and the information will populate into the **Associated to Activity** field.


To finish, select the “Save” button.


Program Closure, Exit, and Outcome

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Program Exit



 **Exit** is the last date of service for all programs and there are no future services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

 The **Exit Clock** refers to the 90 days in which an individual is not receiving any services. If no services are provided for 90 days, the individual is exited from the system.

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Program exit is an important concept for staff to understand. We will define exit and the exit clock.

Exit is the **last date of service** for **all programs** and there are no future clock restarting services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

The **Exit Clock** refers to the 90 days in which an individual is not receiving any services. If no services are provided for 90 days, the individual is exited from the system.

Program Exit



Any additional services requiring significant staff involvement **do** restart the Exit Clock. Self-service, information-only, follow-up, and supportive services **do not** extend the Exit Clock.



The exit is initiated automatically by CalJOBS as soon as the 90 day Exit Clock has lapsed. Note: the exit date is the last date of service not the last day of the Exit Clock.



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When it comes to services, any additional services requiring significant staff involvement **do** restart the Exit Clock. Self-service, information-only, follow-up, and supportive services **do not** extend the Exit Clock.

The exit is initiated automatically by CalJOBS as soon as the 90 day Exit Clock has lapsed. Note: the program exit date is applied *retroactivity* to the last service's actual end date. This means the exit date is the last date of service not the last day of the Exit Clock.

How do we know if an activity restarts the exit clock?

WSIN17-09, Attachment 3

CalJOBS Activity Codes Detailed Listing - Individual

#	Activity Code Name	Adult/ DW	Youth	WP	JVSG	MSFW	TAA	Reporting Category	Exit Clock?	PIRL	Duration (Days)
102	Initial Assessment	x		x		x		Basic Career Service (Staff-Assisted)	YES	1102	90
103	Provision of Information on Training Providers/Performance Outcomes	x		x				Basic Career Service (Self-Service Workforce Information Service)	NO	1101	1
105	Job Finding Club	x		x		x	x	Basic Career Service (Staff-Assisted)	YES	1104, 1322	90
106	Follow-up Services after Employment (prior to exit)	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1200	1
107	Provision of Labor Market Research	x		x		x		Basic Career Service (Self-Service Workforce Information Service)	NO	1101	1
108	Referred to WIOA Services (not training)			x	x	x		Basic Career Service (Self-Service Workforce Information Service)	NO	1113	1

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To learn if an activity code restarts the exit clock, refer to your Activity Codes listing found in the Workforce Services Information Notice 17-09.

Within attachment 3, there is a column titled “Exit Clock?” that indicates whether or not an activity restarts the exit clock. If the value is “Yes” and that service code is added to an individual’s program application in CalJOBS, the 90 day exit clock will be reset.

Closure vs. Outcome

Closure

- Manually entered by staff
- Case management tool
- Does not exit the client from the program
- Not required to exit the client from the program

Outcome

Exit

- System generated
- Also called "soft exit" or "common exit"

Exclusionary Outcome

- Other exit reason: institutionalized, health/medical, deceased, reservist called to active duty, in foster care and moved from area by foster care system
- Manually entered by staff

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We covered how to create a closure in CalJOBS, but it is important to know that closure and exit/outcome are **not** the same thing.

Closure = closing a program. (Not to be confused with closing an activity). Closure is manually entered by staff, does not exit the client, and is not required for the client to exit.

Closing a program gives staff the ability to add follow-up activities, enter employment attainment information, and allows staff to run reports quicker.

Exit/Outcome= system generated, occurs on last date of service, signaling that a participant is no longer in the program. Or, a client may exit based on an exclusionary outcome, which is very rare.

Closure Form

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Case Closure

Activities / Enrollments / Services

Create Activity / Service / Enrollment

Search

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
🟡	205 - Development of IEP/SS/EDP SETA Satellite Services	🟡	Adult	N/A	12/12/2016	01/01/2017	12/12/2016 Successful Completion
🟡	219 - Work Experience MC3 Pre-Apprenticeship Training	🟡	Adult	N/A	12/12/2016	01/10/2017	12/12/2016 Successful Completion
🟡	101 - Orientation No Provider Information	🟡	Adult	N/A	12/12/2016	12/12/2016	12/12/2016 Successful Completion

Entering information into the Closure ribbon for your program participants is highly recommended, as project outcome information is entered and gathered here.

After expanding the Title I Application, and expanding the **Activities/Services/Enrollments** ribbon, you will see the activities table. This table shows that all activities have been closed out. You cannot complete a closure, unless all activities are closed. Once all activities are closed, you can complete a closure.

Creating Case Closure

Case Summary Programs Plan Assessments

Show Summary Tabs Bridges, Brody

Filter Applications: All

Filter Activities: ☒ Open ☒ Closed ☒ Voided

Filter Programs: Title I - Workforce Development

Title I - Workforce Development Apps: 1

Closure

[Create Closure](#)

With the Title I Application expanded, click anywhere in the gray ribbon called **Closure** to expand it.

Click the "[Create Closure](#)" link.

General Information

Username: 32574

Name: Bridges, Brody

Last service date:

Exit Date:

Exit Reason:

LWIA: 36 San Jose Silicon Valley, Workforce Investment Netw

• Office Location: 06902 San Jose CWD

Agency Code Search: [Agency Code Search](#)

Agency Code: N/A

Case closure date: 02/14/2017

• Accountability Closure/Exit Status:
None Selected
1 - Invalid SSN or failed to disclose SSN
2 - Retirement
3 - Neither condition applies

After selecting the “[Create Closure](#)” link, under **General Information** enter your **Office Location** if it is not prepopulated.

Choose the **Accountability Closure/Exit Status** by selecting the drop-down arrow. Options are shown on this slide. You will most likely choose option 3 – “Neither condition applies.”

Outcome Information

School Status at Exit: Not attending school, H.S. Graduate

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

✓ Documentation in Case File

None Selected
 In-school, High School or less
 In-school, Alternative School
 In-school, post High School
 Not attending school, or H.S. Dropout
 Not attending school, H.S. Graduate
 Not attending school; within age of compulsory school attendance

* **Youth Placement at Exit:** None Selected

Placement Date:

Entered post-secondary education
 Entered Advanced training
 Entered Military Service
 Entered a qualified apprenticeship
 None of the above

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Scrolling down, under **Outcome Information**, select the appropriate **School Status at Exit** from the dropdown menu. Our example shows “Not attending school, H.S. Graduate.”

If your individual is a Youth, you may have a **Youth Placement at Exit** field. If so, select the appropriate option from the dropdown.

Employment Information

Entered Employment: None Selected
Yes
Yes, Recall Employer
No

No employers available.

[Add Employer]

Staff Information

[Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

Current Case Manager: Case currently Not Assigned to a Case Manager
[Assign Case Manager](#)
[Assign Me](#)
[Remove Case Manager Assignment](#)

Save Cancel Delete

Closure

[Edit Closure](#)

Closure Date: 02/23/2017

Finally, choose whether or not the individual entered employment in the **Employment Information** section.

If “Yes” is chosen, the employer information must be completed in the system by selecting the “Add Employer” link.

“Yes, Recall Employer” can be selected if the individual returns to work for a previous employer, and that employer has been captured in CalJOBS.

If “No” is chosen, complete the **Staff Information** if applicable. Select the “Save” button to generate a case closure. The case closure date will now appear within the **Closure** ribbon of the Title I Application.

Add/Edit Employer

Employer Information

[Search Individual Employment History](#)
[Select from Internal Job Order/Placement](#)

* Employer Name:

Verify Employer Name: [\[Verify \]](#) [\[Scan \]](#) [\[Upload \]](#) [\[Link \]](#)

Employer FEIN:

Address Line 1:

Address Line 2:

City:

State/Province:

County/Parish:

Zipcode:

Find Zip Code: [\[USPS \]](#)

Country:

Industry Code (NAICS): [Search for NAICS Code](#)

Industry NAICS Code:

Industry NAICS Description:

* Primary Employer Contact Name:

* Primary Employer Contact Phone Number: - - Ext

Primary Employer Contact Email:

Is this employer a federal contractor? ☐ Yes ☐ No

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If you selected the “[Add Employer](#)” link (shown on the previous slide), please complete the required fields. When typing into the **Employer Name** field, the system may populate a drop-down of potential employers. For example, if you begin typing “Target”, a list of possible Target locations will populate as options. If you select the employer from the drop-down, much of the information in the subsequent fields (address, NAICS Code, and contact number) will be entered with the appropriate information. You must ensure all required fields are complete before moving to the next section.

If you begin to type in an employer and the system does not populate options in the drop-down, you can still enter the employer’s information manually.

Job Information

* Job Title:

* Occupation: [Select Occupation](#)

* Is this a green job? ☐ Yes ☐ No

* Hours Worked per Week:

* Hourly Wage:

* Job Start Date:

Job End Date: ☐ Currently Employed

Reason for Leaving:

Additional Information on reason for leaving:

Primary Employer: ☐ Yes ☐ No

* Receiving Fringe Benefits: ☐ Yes ☐ No

* Job Covered by Unemployment Compensation: ☐ Yes ☐ No

* Is this Entrepreneurial and/or Self-Employment?: ☐ Yes ☐ No

* Is this a Registered Apprenticeship? ☐ Yes ☐ No

* Is this active Military Service? ☐ Yes ☐ No

* Is this considered Non-Traditional Employment? ☐ Yes ☐ No

Is this considered Training Related Employment?

Add to Employment History: ☐ Yes ☐ No

[Save](#) [Cancel](#)

Continuing with the **Add/Edit Employer** section, enter all required **Job Information** fields. Select “Save” upon completion.

Added Employment Information

Employment Information

Entered Employment:

Employer Name	Job Title	Start Date	End Date	Non-Traditional	Training Related	Action
Target	Customer Service Representativ	02/23/2017		No	No	Edit Delete

[\[Add Employer \]](#)

This table will populate in the case closure screen as a result of entering the employment information.

Program Exit

How does this work in the system?

The screenshot shows a software interface for managing program exits. It features two main sections. The top section, titled 'WP #199209 - Case Closed', contains a table of participant information. The bottom section, titled 'Exit / Outcome', contains fields for editing exit information. Several fields are circled in pink to highlight key data points.

WP #199209 - Case Closed			
LWIA:	25 - City of Oakland Community and Economic Development	Application Date:	09/05/2011
Onestop:	898 - 03300 Oakland/Alameda (WSB)	Participation Date:	09/05/2011
Total Activities:	1	Closure Date:	N/A
		Exit Date:	11/03/2011

Exit / Outcome	
Edit Exit/Outcome	
Exit Date: 11/03/2011	Exit Reason: Soft Exit

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The system exits the participant when 90 days have passed since the last date of service across Title I, TAA, and Title III-WP applications. You will find the program exit information within the individual's Title I program application. You will notice a date in the **Exit Date** field in the top portion of their Title I application information, as well as dates and exit reason on the **Exit/Outcome** ribbon.

Exclusionary Outcome

Case Summary
Programs
Plan
Assessments

Show Summary Tabs Bridges, Brody

Filter Applications:
All
Filter Activities:
☒ Open
☒ Closed
☒ Voided
Filter Programs:
Title I - Workforce Development

Title I - Workforce Development
Apps: 1

Exit / Outcome
[Create Exit/Outcome](#)

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In limited circumstances, a staff member has the ability to tell the system, “I know for certain that this person is not coming back to receive more services”. Instead of waiting the 90 days, the participant exits immediately. This is called an Exclusionary Outcome.

An Exclusionary Outcome is **ONLY** used when an individual cannot complete the program due to certain circumstances, such as death, significant health issues, or incarceration.

You would only use this option when there is documentation proving that the Exclusionary Outcome exists. Please be sure to consult with co-enrollment or open applications with other Local Areas prior to completing an Exclusionary Outcome.

To complete an Exclusionary Outcome, select the “[Create Exit/Outcome](#)” link.

General Information

Login Name: BATMAN2016

User ID: 32574

State ID: 31637

Name: Bruce Wayne

• **LWIA/Region:** None Selected

• **Office Location:** None Selected

• **Staff Position:** Staff

Exit Information

• **Exit Date:** 04/23/2017 [Today](#)

Exit Reason: None Selected

Institutionalized

Health/Medical

Deceased

Reservist called to Active Duty

In Foster Care and moved from area by foster care system

Choose your **LWIA/Region**, **Office Location**, and **Staff Position** from the drop down menus, if not already populated.

Under the **Exit Information** section, enter the **Exit Date** (last date the individual received a service).

Choose the exclusionary outcome reason from the **Exit Reason** drop down menu. Again, these are the only reasons an Exclusionary Outcome would be completed.

The screenshot shows a web application interface with a light blue background. At the top, there is a tab labeled "Alternate Contact Information". Below this, there is a section titled "Manage Alternate Contacts" with a sub-header "Contact List". Under "Contact List", it says "No Contacts for individual".

Below the "Contact List" section is a "Staff Information" section. It contains a link "Add a new Case Note" and a link "Show Filter Criteria". Below these links is a table with the following headers: "ID", "Create Date", "Subject", and "Action". The table body contains the text "No data found."

Below the table is a section titled "Current Case Manager:". To the right of this section, it says "Case currently Not Assigned to a Case Manager". Below this text are three links: "Assign Case Manager", "Assign Me", and "Remove Case Manager Assignment".

Below the "Current Case Manager:" section is a "Comments:" label followed by a text input field.

At the bottom of the form, there are four buttons: "Save", "Cancel", "Delete", and "Print". The "Save" button is highlighted with a pink circle.

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Complete the **Alternate Contact Information** and **Staff Information** sections, if desired.

Select the "Save" button.

Exclusionary Outcome - Displayed

Case Summary Programs Plan Assessments

Show Summary Tabs Bridges, Brody

Filter Applications: All ☒ Filter Activities: ☒ Open ☒ Closed ☒ Voided

Filter Programs: Title I - Workforce Development ☒

Title I - Workforce Development Apps: 1

Exit / Outcome 04/23/2017

[Edit Exit/Outcome](#)

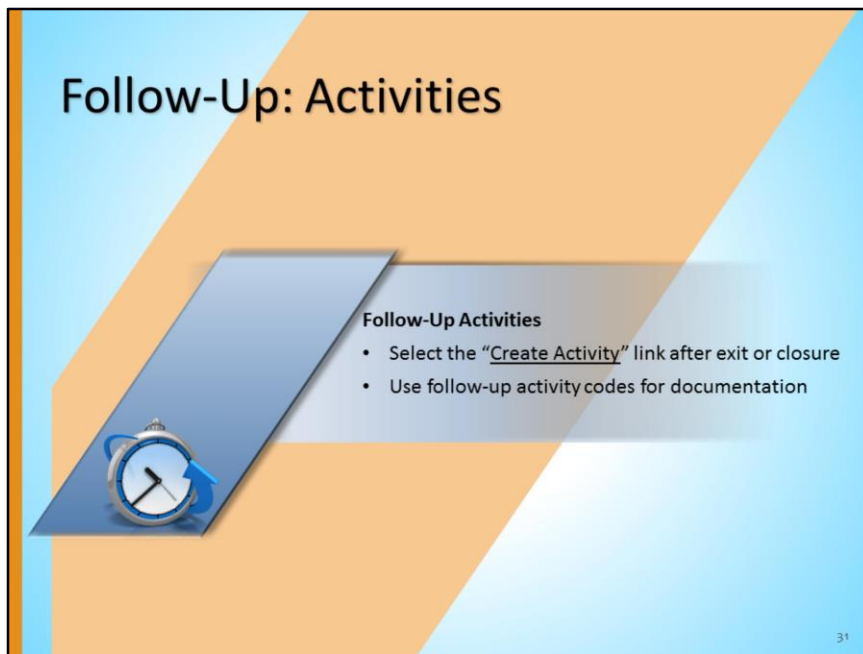
Exit Date: 04/23/2017 Exit Reason: Institutionalized

This is what the Exclusionary Outcome will look like once completed in the system.

Follow-Up Activities and Follow-Up Forms

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After a closure is created or when an individual exits the program, follow-up activities populate as options when adding an activity code.



Follow-up activities can be created after exit or after creating closure, by selecting the “Create Activity/ Enrollment/ Service” link from the **Activities/Enrollments/Services** ribbon. Follow-up codes are used for documentation of the services you provide after closure or exit.

Follow-Up Activities

Activity Code	Activity Title
F01	Referral to Community Resources
F02	Referral to Medical Services
F03	Tracking Progress on the Job
F04	Work Related Peer Support Group
F05	Assistance securing better paying job
F06	Career development and further education planning
F07	Assistance with Job/Work Related Problems
F08	Adult Mentoring
F09	Tutoring
F10	Leadership Development

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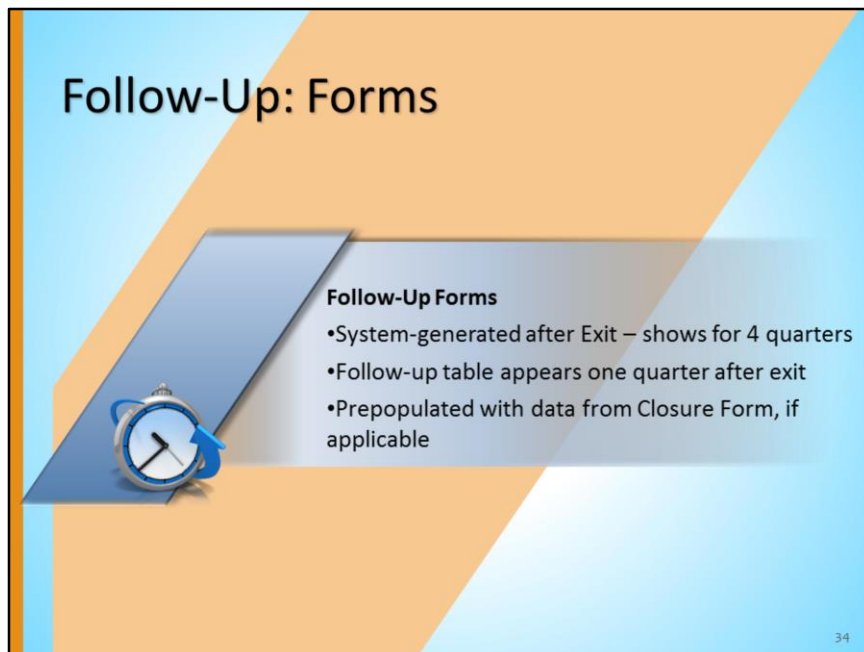
This is a list of possible follow-up codes you can enter into CalJOBS. These are known as F-codes because the activity codes to choose from all begin with the letter "F."

Follow-Up Activities – F Codes

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	F10 - Leadership Development Napa Valley Adult School		Adult	N/A	02/23/2017	02/23/2017	Close
	202 - Career Guidance/Planning No Provider Information		Adult	N/A	12/12/2016	12/12/2016	12/12/2016 Successful Completion
	101 - Orientation No Provider Information		Adult	N/A	12/12/2016	12/12/2016	12/12/2016 Successful Completion

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The F-Code will populate in the Activity table as a Follow-up service. To close the activity, follow the same steps as closing out a regular activity.



Follow-up is intended to support the participant in retaining employment and continuing to improve their employment success after exit.

In CalJOBS, the system generates a follow-up table with follow-up forms for 4 quarters after exit. This table does not populate until after the 90th day after exit. If the closure tab was utilized, data from that tab may pull over into the follow-up forms.

Follow-Up Forms

Case Summary Programs Plan Assessments

Show Summary Tabs Bridges, Brody

Filter Applications: All ☒ Filter Activities: ☒ Open ☒ Closed ☒ Voided

Filter Programs: Title I - Workforce Development ☒

Title I - Workforce Development Apps: 1

Follow-ups 4

Create Local Follow Up

Search:

Required By	Date Complete	Status	Follow Up Type
09/30/2017		Required	1st Quarter After Exit
12/31/2017		Required	2nd Quarter After Exit
03/31/2018		Required	3rd Quarter After Exit
06/30/2018		Required	4th Quarter After Exit

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Within the Title I program application, there is a ribbon titled “Follow-ups”. This section is for entering follow up information, including employment information.

To enter follow-up information, select the link in the “Follow Up Type” column for the quarter you would like to enter follow-up information.

The first section, General Information, populates with system information. **Alternate Contact Information** and **Contact Attempts** can be recorded in the corresponding sections, if desired.

In the **Follow-Up Employment Information** section, if you had previously entered employment information in the closure tab, that information would populate in the **Employer Name** field. If the individual was still working for that employer in the quarter defined in the **Worked in Quarter?** question, there is no need to add employer information.

If employment information was not entered into the closure tab, because the individual was not working at the time of the closure or if staff did not complete the closure tab, you will see a message in the **Employer Name** section, "No Employment information". If you answer "Yes" to the **Worked in Quarter?** Question, employment information needs to be entered by using the Add Employer link. The employer entry screen is the same screen as the one in the closure tab.

Follow-Up Forms

Youth Placement Information

Youth Placement and Date at Case Closure:

Not Applicable

Previous Follow-up Placement and Date Information:

Not Applicable

* Current Placement (WIA):

None Selected

Entered post-secondary education

Entered Advanced training

Entered Military Service

Entered a qualified apprenticeship

None of the above

Date Of WIA Placement:

Current Placement (WIOA):

None Selected

[Verify | Scan | Upload | Link]

Next, if your individual is a Youth, you will encounter the **Youth Placement Information** section. Complete the Current Placement (WIA) field by selecting the appropriate answer from the drop-down.

Follow-Up Forms

Exit and Closure Information
Exit Date: 07/17/2017
Employment Status: No Closure Employment Information
Youth Status at Exit: Not Applicable
Placement Status at Exit: Not Applicable

Current Status at Follow-up
Follow-up Information:
*** Actual Date of Follow-Up:** Today
*** Contact Type:** None Selected ✓
Other (specify):
*** Received 12 months of Follow-Up services** ☐ Yes ☐ No
This section is required only when no employment, no youth placement and no youth diploma
Follow-up Status
Status at Follow-Up: None Selected ✓
Other (specify):
Comments:

None Selected
Telephone - Individual
Telephone - Employer/School
Letter or Survey Sent to Individual
Letter or Survey Sent to Employer/School
Worksite visit
Home Visit
Other (Specify)

None Selected
Institutionalized
Relocated to Mandated Residential Program (youth)
Retirement
Health/Medical
Deceased
Reservist called to Active Duty
Family Care
Lacks Transportation
Cannot Locate
Exit (Transferred) to other LWIA
Refused to Continue
Other (specify)
Transferred to other funding

If your individual is not a Youth, the next section you will see is the **Exit and Closure Information** section. This information is system generated.

In the Current Status at Follow-up section, complete the required fields. Enter the date of the follow-up in the **Actual Date of Follow-up** field and select the appropriate **Contact Type**. You can choose from a variety of options, shown on this slide.

Next, you may need to answer the mandatory question, **Received 12 months of Follow-up services**.

As noted by the blue text, the following fields are only required when no employment, no youth placement and no youth diploma/credential is recorded on this screen. If that is the case, answer the **Status at Follow-Up** question with one of the many options.

Follow-Up Forms

Staff Information

* LWIA/Region:

* Office Location:

Agency Code: [Agency Code Search](#)

Staff User Create: GSSOFTEDT

Create Date: 09/08/2017

Staff User Edit: GSSOFTEDT

Edit Date: 09/08/2017

[Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

Current Case Manager:

Case currently Not Assigned to a Case Manager

[Assign Case Manager](#)

[Assign Me](#)

[Remove Case Manager Assignment](#)

Save **Cancel** **Print**

Finally, ensure the LWIA/Region and Office Location fields are complete, and answer any remaining fields, if desired. Select the “Save” button to finish the follow-up entry.

Follow-Up Forms

Follow-ups

4

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
09/30/2017	08/30/2017	Completed	1st Quarter After Exit
12/31/2017		Required	2nd Quarter After Exit
03/31/2018		Required	3rd Quarter After Exit
06/30/2018		Required	4th Quarter After Exit

The completed follow-up will now appear within the table on the **Follow-ups** ribbon, noted by the date it was complete. To edit the follow-up, select the corresponding link in the "Follow Up Type" column.

System Alerts

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Alerts

Communications > Alerts > My Alerts

Alerts make staff aware of specific upcoming dates

Communications	
Messages	
Correspondence	
Alerts	My Alerts
Virtual Recruiter Alerts	Text Watch
Email Log	View System Alerts

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Alerts are a helpful feature for case managers.

From the **Communications** left navigation menu, hover over **Alerts**.

Select **My Alerts** from the fly-out menu.

My Alerts

[Modify My Alert Subscriptions](#)

- Click Modify My Alert Subscriptions
- Select any Alerts to set

Alert Description	Days	Notify
<input type="checkbox"/> WIOA Activity Projected Start Date This alert will notify you when an Individual in your case load has projected WIOA activity start date that is about to occur.	<div style="border: 1px solid black; padding: 2px;"> None Selected 1 day prior 5 days prior 15 days prior 30 days prior </div>	<div style="border: 1px solid black; padding: 2px;"> <input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after </div>

Click **Modify My Alert Subscriptions** and select which **alerts** from the list you would like to set.

Alerts are listed by category: Individual Registrant, Job Order Alerts, Eligible Training Provider, Wagner-Peyser, WIOA (Title I), Trade Adjustment Assistance, Generic Program, Miscellaneous, IEP, and Employer Profile alerts. Shown here is the **Job Orders about to Expire** alert.

Select the timing for when the alert should run by making a selection from the drop-down list in the **Days** column. The options in this list vary depending on the type of alert subscription being run.

Then, make a selection in the **Notify** column to choose how frequently the system will alert you for a subscription, if applicable. The system can alert you *On the day only* that an alert would be valid (i.e. on the exact day job order's expiration). The system can also notify you on that day and *Everyday after* that the alert is still valid and the issue is outstanding.

Helpful Alerts

- WIOA Activity Projected Start Date
- IEP Goals Alert
- WIOA Soft Exit
- WIOA Follow-up Alert

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These alerts may be helpful, but you will want to review the entire list to choose which alerts you want to run.

Workforce Innovation and Opportunity Act (WIOA) Alerts			
	Alert Description	Days	Notify
<input checked="" type="checkbox"/>	WIOA Activity Projected Start Date This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	1 day prior	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Activity Projected End Date This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Soft Exit This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Male Participants about to turn 18 This alert will notify you when an Individual in your case load is about to turn 18 years of age.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Younger Youth Goals About to Expire This alert will notify you when an Individual with Youth Goals is about to expire where the status is set but attainment is pending.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Participants expiring work authorization This alert will notify you when an Individual in your case load whose authorization to work is about to expire.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Followup Alert This alert will notify you when an Individual in your case load has a follow-up date that is nearing.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Literacy Numeracy Pre-Test has not been posted This alert will notify you when a Youth is enrolled that meets the requirement for literacy numeracy testing has not had a pre-test posted within 60 days of their first youth service date.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Pre-Applications Pending This alert will notify you of pending WIOA Pre-Applications that are completed by individuals.	N/A	N/A
<input type="checkbox"/>	WIOA Literacy Numeracy Post-Test has not been posted The following individual(s) in your case load who have Literacy Numeracy Pre-tests approaching their anniversary date in XX days XX (from Number of Days in e.g. 130 as of SYSTEM DATE, you should update the literacy numeracy records appropriately).	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity This alert will notify you when an Individual in your case load has not generated any new WIOA activity since the number of days specified.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after

Alerts

Summary

Alerts make staff aware of specific upcoming dates

Communications	
Messages	
Correspondence	
Alerts	My Alerts
Virtual Recruiter Alerts	Text Watch
Email Log	View System Alerts

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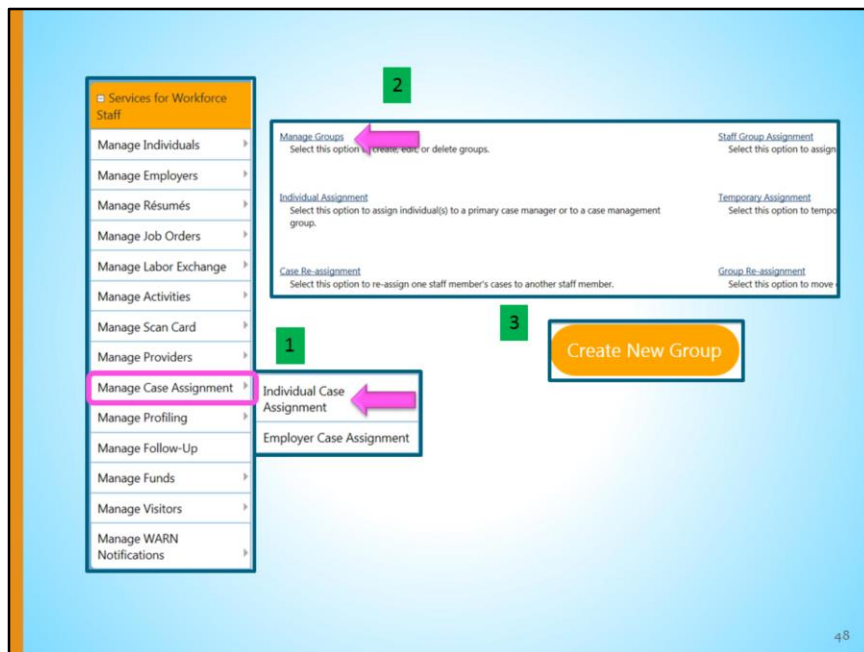
Alerts are a helpful feature for case managers. Choose any alerts that are beneficial for you.

Access Note: In order to use Alerts, you must have Case Management Groups created for your office. This is because the language of the alerts reads: “notify when an individual in your case load...”. You must assign yourself as the case manager of the individual in the program application to add them to your case load.

Case Management Groups

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As mentioned in the previous slide, in order to use Alerts, you must have Case Management Groups created for your office. For Local Areas, Case Management Groups can be created by MIS Administrators. For Non-Local Areas (or Community Based Organizations), any staff member should have access to create Case Management Groups.



Case management groups are required if organizations would like to be able to assign a case manager to an individual.

First, we must create a group by following the steps in this slide.

CalJOBS

Create a group.

* indicates required fields. For help click the question mark icon.

*Group Name:

*Program:

*Location Type:

*Location:

*Group Description:

Save **Cancel**

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Next, complete the required fields and select the “Save” button. You will notice that a couple of the fields shown will not populate on the first screen, but will populate after you answer the **Group Name** and **Program** fields.

After selecting “Save” you will be routed back to the list of existing groups.

Manage Groups
Select this option to create, edit, or delete groups.

Individual Assignment
Select this option to assign individual(s) to a primary case manager or to a case management group.

Case Re-assignment
Select this option to re-assign one staff member's cases to another staff member.

Staff Group Assignment
Select this option to assign staff members to case management groups.

Temporary Assignment
Select this option to temporarily assign one staff member's cases to another staff member.

Group Re-assignment
Select this option to move cases from one group to another.

Group ID	Group Name	Office	Location
232	L and R Career Center Group	Office: 2628	WIOA

Program: WIOA
Group Name: L and R Career Center Group
Location Name: 2628 - L & R Career Center

Show Staff as: All
Display: 100

To sort on any column, click the column title.

Username	First Name	Last Name	Assign	Group Lead
lyndseylohan No Priv.	Lyndsey	Lohan	<input type="checkbox"/>	<input type="checkbox"/>

Assign Users to Group
Selects Assign Users to Group

Next, we will choose the staff members we would like associated with the group.

First, select the Staff Group Assignment link from the **Individual Case Assignment** screen.

Second, from the table, find the group you just created and select the name of the group. It may be located at the bottom of the list. For more results, increase the "Display" box to a higher number (999 max).

Third, you will see a list of staff members associated with the LWIA and/or Office Location of your group. Select the staff members you would like to assign to the group in the right side of the columns. **Note:** you must assign a "Group Lead" for your group.

Finally, select the "Assign Users to Group" button. Staff will now be able to assign themselves as a case manager for individuals.

Objectives Summary

- Entered credential attainment
- Distinguished Closure, Exit and Outcome
- Completed Closure Form
- Entered Follow-Up Activities and Follow-Up Forms
- Reviewed System Alerts and Case Management Groups

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In this training, we:

- Entered credential attainment
- Distinguished Closure, Exit, and Outcome
- Completed Closure form
- Entered Follow-Up Activities and Follow-Up Forms
- Reviewed System Alerts and Case Management Groups